



## Grants Training – Club Qualification

District 5450 - June 15, 2023

The  
**Rotary**  
Foundation



Rotary



# District 5450 Grants Qualification Training



PLACEBUILDING AND  
CONFLICT PREVENTION



DISEASE PREVENTION  
AND TREATMENT



WATER, SANITATION,  
AND HYGIENE



MATERNAL AND  
CHILD HEALTH



BASIC EDUCATION  
AND LITERACY



COMMUNITY ECONOMIC  
DEVELOPMENT



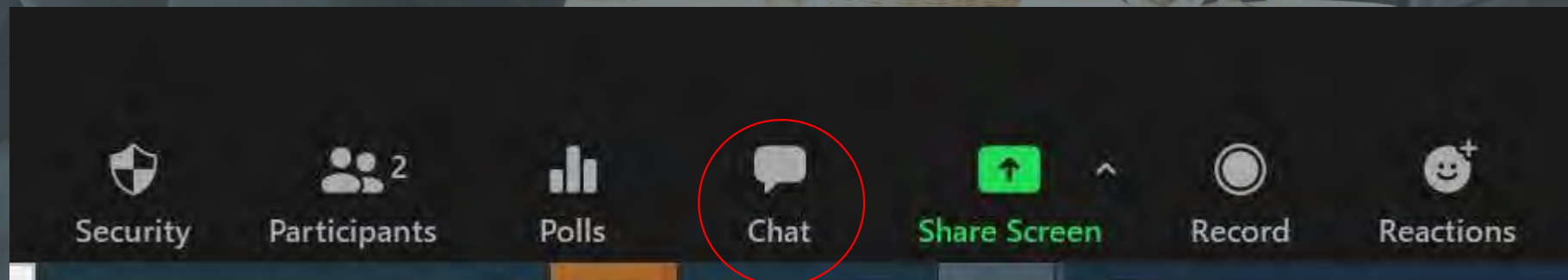
ENVIRONMENT

The  
**Rotary**  
Foundation





Please use the Chat function to ask a question – a moderator will ask your questions for you. We will have time after each section and at the end of the training for additional questions.



# AGENDA

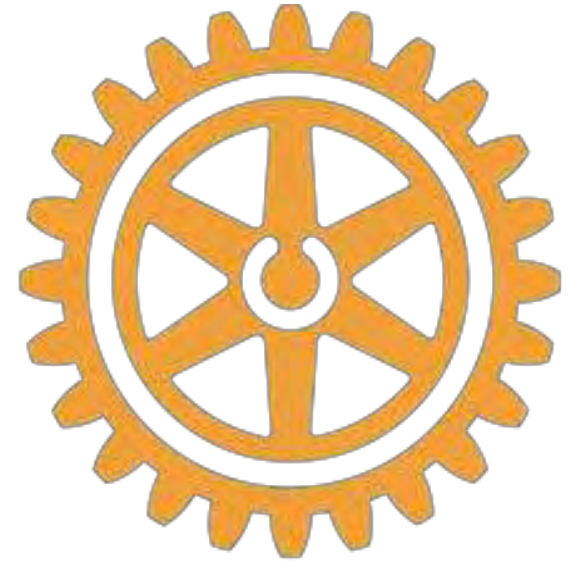
Start Time	Elapsed Time	Topic	Presenter
6:00	5 min	Opening	<b>Marty Waters</b> , Grants Chair <b>Beverly Mendel</b> , District Ops Manager
	5 min	Welcome and Comments	<b>Buchi Anikpezie</b> , District Governor
	40 min	District Grants	<b>Marty Waters</b> , Grants Chair
	10 min	Club Qualification	<b>Dave Willman</b> , District Rotary Foundation Chair (DRFC)
7:00	40 min	Global Grants	<b>Bob Kemp</b> , District International Services Chair (DISC)
7:10	10 min	District Grants	<b>David Willman</b> , District Rotary Foundation Chair (DRFC)
	10 min	Questions / Discussion	Grants Team/Participants
8:00		Conclusion	



Greetings  
from the  
District Governor

DG Buchi  
Anikpezie

# Rotary District 5450



CREATE HOPE  
in the WORLD



**CREATE HOPE**  
**in the WORLD**

Marty Waters  
District 5450 Grants Chair





# WHY WE ARE HERE



# DISTRICT TOPICS



- Definition of District Grant
- Eligibility
- Applying
- Reviewing
- Payment/ Financial Controls
- Restrictions / Limitations
- Cooperating Organizations
- Benefitting Entity
- Reporting
- Important Changes
- Resources





# WHAT IS A DISTRICT GRANT?



- Humanitarian project
- Short term (one year)
- Either local or international
- Intended for smaller projects (i.e. not global scale)
- District Grant Funds (DDF) come from the Rotary Foundation (TRF) based on District contributions 3 yrs earlier
- District responsible for administering



# Activity Snapshots 2019-2023



## 2022 – 2023

38 clubs requested DDF (64% of all clubs)  
40% international / 60% local  
43 projects / \$117K DDF (avg \$2731 per grant), \$10455 avg for total grant

## 2021 – 2022

38 clubs requested DDF (64%)  
47% international / 53% local  
35 projects / \$90K / Avg \$2571 per grant

## 2020 – 2021

32 clubs requested DDF (55%)  
22% international / 78% local  
48 projects / \$112K / Avg \$2333 per grant

## 2019 – 2020

36 clubs requested DDF (62%)  
54% international / 46% local  
41 projects / \$116K / Avg \$2829 per grant



# Activity Snapshots: Impact



## Impact by Project Types

17% **Sustained Impact / Empowerment**, e.g. Career training, business enterprise development , WASH project, environmental mitigation

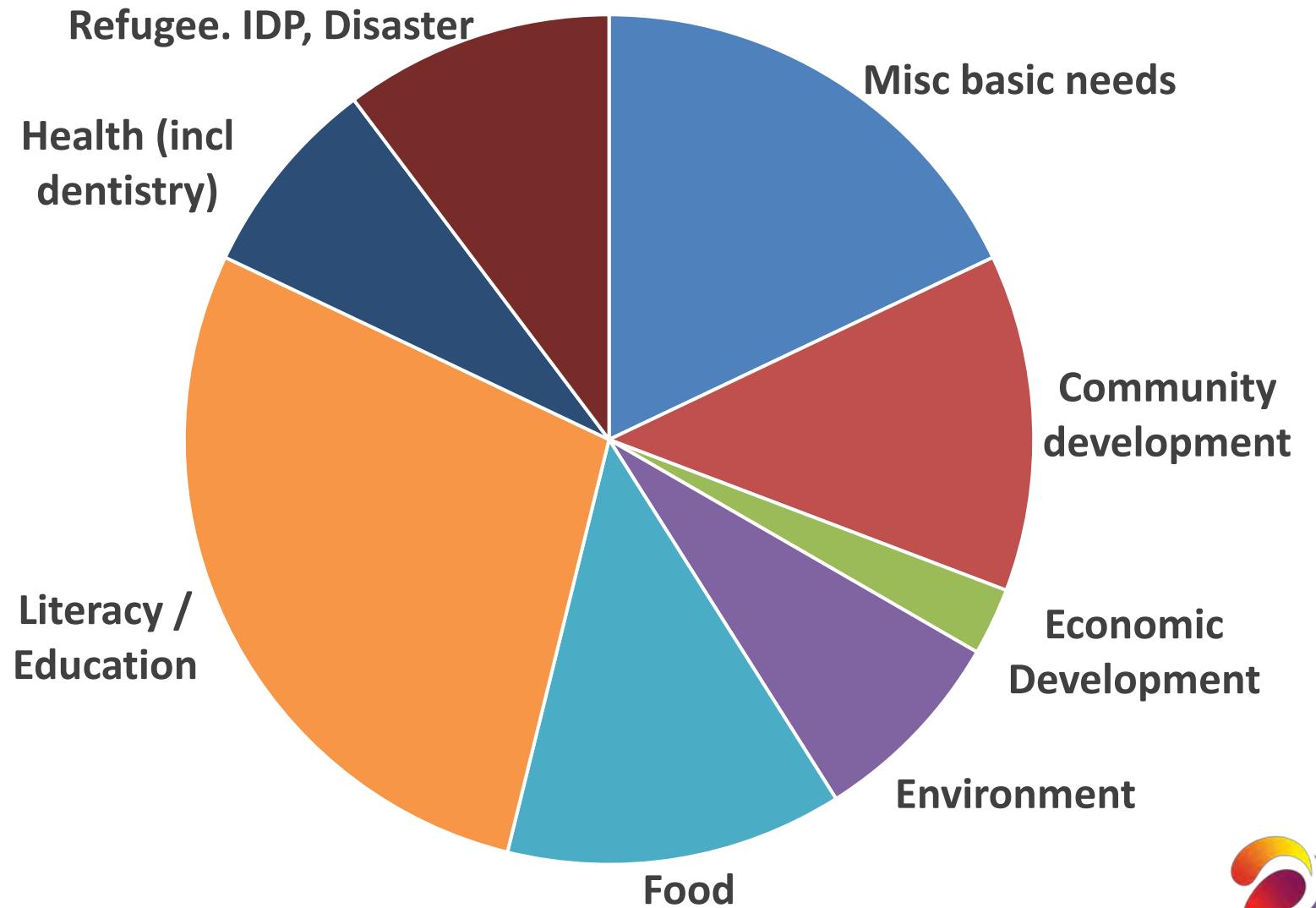
56% **Intermediate Impact** , e.g. housing access support, short term MH counseling, literacy, dental services

27% **Immediate Impact / “Good Will”** , e.g. holiday events, one-time gifts, clothes, living necessities, food security

# Activity Snapshots: Impact



## 2022 – 2023 Project Types





# ELIGIBILITY



1. **Club's qualification** to submit grant:
  - Club President **attends a Presidents-Elect Training Seminar (PETS) training** or an approved alternative.
  - Club President or Representative **attends District 5450 grant training** seminar
  - **MOU signed** by the president and president-elect
  - Proof of current filed **IRS Form 990**
  - **Reporting** on prior Rotary grants **up to date.**
  
2. **Satellite Groups ineligible** (as such are considered members of sponsoring club)

# ELIGIBILITY



## 3. Proposed grant activities:

- Meet a **need identified** by the beneficiary community
- **Active participation** of District 5450 Rotarians:
  - Assessment of community needs
  - Development and management of a Project plan
  - Project implementation
  - Financial stewardship of Grant funds
  - Promotion of the Project through Rotary signage and publicity





# ELIGIBILITY



## 3. Proposed grant activities: (cont'd)

- **Comply with laws** in US and in the area where the project is implemented
- Be **reviewed and approved** by District Grants Committee **before implementation** (*grants may not be used to reimburse for activities completed or in process prior to approval*)
- After grant approval, **subsequent changes** to plan require pre-approval by District
- Be **completed within 12 months of approval** (unless waiver has been granted)



# ELIGIBILITY



4. Grant-related **administrative expenses** must not exceed 10% of the total budget
5. Each Rotary year, the District will advise Clubs about **potential limits on DDF** for the year. (available on the grants page of the District Website).





# ELIGIBILITY



6. DDF allocated on a **first-come/first-served** basis until exhausted.
7. District **right to prorate** some awards if the pool is exhausted before the end of the Rotary year
8. Grant sponsors must fully **account for the source and utilization** of any funding required to accomplish the Grant Project. The proposed budget must also be sufficient to accomplish the stated objectives



# HOW TO APPLY



1. Complete and submit a signed copy of the District Grants Application paper form\* to the District Grants Committee via email, [grants5450@gmail.com](mailto:grants5450@gmail.com) or complete the online version with required attachments found at <https://portal.clubrunner.ca/50085/SitePage/grants>
2. As indicated, submit the following items:
  - A signed **Cash and DDF Confirmation form** from all participating clubs, including the sponsoring Club
  - A signed **letter/MOU\* from the cooperating organization**, if applicable
  - A signed letter/MOU\* from the international partner (Rotary Club or non-Rotary organization), if applicable
  - A completed **OFAC form** for all international grants

\*(see resource page)



# HOW TO APPLY



3. Submission of the grant application to the District Grants Subcommittee does **not guarantee approval** or availability of DDF funds.
4. If the grant application does **not pass** the review process and **move to the approval phase within 90 days of initial submission, the application will be canceled.** The Club will be required to make a fresh submission when it has all the required documentation and/or resolved pending issues.



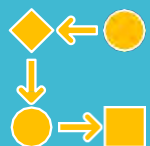
# HOW TO APPLY



5. If grant **implementation has not commenced within 90 days** of approval, the grant will be canceled, and the sponsors will be required to return the funds. The only exception is when a special waiver has been granted by the District Grants Committee.
6. **Funds should never be collected from beneficiaries** in exchange for receiving the grant or as part of the cash contribution toward a match.



# WHAT HAPPENS AFTER YOU SUBMIT YOUR GRANT?

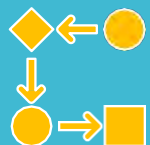


1. **Assigned to a reviewer.**
2. Reviewer will **contact you**/your Club **within 7 days** of the assignment **with feedback** from the review:
  - Might include questions or request for additional information.
  - Contact the District Grants Subcommittee Chair if you have not heard from the reviewer at the end of the specified time.
3. Application **proceeds to approval vote** once it is deemed complete, i.e.
  - All concerns arising from the initial review has been addressed or
  - No concerns arising from the initial review.





# WHAT HAPPENS AFTER YOU SUBMIT YOUR GRANT?



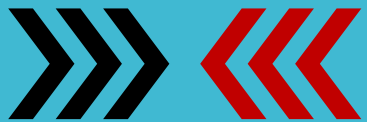
4. District String (District Governance group and Foundation Chair) Approval, **vote typically takes 1 – 7 days**

- Any questions that arise at this stage will have to be addressed by the project champions and/or the Club.

5. The **club is notified** of the outcome of the vote.

6. Please note that all **communications** related to your grant will be done using the email(s) listed on the grant application form.

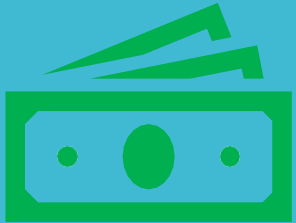
# CONFLICT OF INTEREST POLICY FOR PROGRAM PARTICIPANTS



1. A **conflict of interest** occurs when someone is in a **position to make or influence a decision about a grant that could benefit them**, an immediate family member, a **business partner**, or an entity in which they, an immediate family member, or a business partner has a significant financial interest or in which any of them is a trustee, director, or officer.
2. All actual or potential conflicts of interest must be **disclosed in the grant application**. If you are not sure if there is a potential conflict, you should disclose it.
3. Rotarian(s) **cannot serve as contact or champion** for any grant project for which they may have a potential conflict of interest.



# PAYMENTS/ FINANCIAL CONTROLS

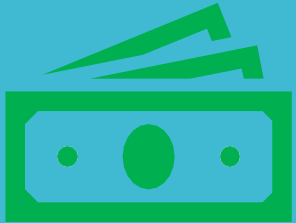


1. Grant funds will be **paid only** to the District 5450 Rotary **Club that was listed as the sponsor** in application.
2. Funds will **not be disbursed** by the District until the sponsor Club has completed and submitted the ***"Request by Clubs for District Grant Matching Funds"***, a copy of the grant award email and other required documentation to the District.
3. If grant payment/disbursement requirements are **not met within 90 days** of approval, the grant will be canceled.





# PAYMENTS/ FINANCIAL CONTROLS



4. Grant funds must be held in a **Club-sponsored bank account**. This account cannot be the Club's Foundation account.
5. Once the grant is approved, the project **implementation can begin** (even before funding is received).
6. **Expenses incurred before** the Grant is approved are not eligible for reimbursement.



# PAYMENTS/ FINANCIAL CONTROLS



7. Funds must be **under the control** of Rotarians:
- The **beneficiary** organization **may be given funds** for specific purchases if that is more efficient
  - **Partial payments** in advance are permitted with clear documentation of expenditures
  - **Receipts** for all expenditures are required.



# RESTRICTIONS/ LIMITATIONS TO USE OF GRANT FUNDS



Grant funds **cannot be used** for:

1. **Continuous or excessive support** of any single beneficiary, entity, or community
2. Vocational teams, Youth Exchange, RYLA, or YRYLA
3. Any **travel** for needs of project assessments and monitoring. *(Travel expenses of Rotarians and non-Rotarians who are essential to the completion of the Grant Project will be considered for reimbursement. The Grant application must identify each such participant and state their qualifications as essential participants).*
4. The **purchase or construction of buildings**. The **purchase of land** is also prohibited.





# RESTRICTIONS/ LIMITATIONS TO USE OF GRANT FUNDS



Grant funds **cannot be used** for:

- 5. **Fundraising** activities or **microcredit projects**.
- 6. **Public relations initiatives** unless they are essential to carrying out the project.
- 7. **Project signs** that cost > \$500.
- 8. The **operating, administrative, or indirect program expenses** of another organization.
- 9. **Unrestricted cash donations** to a beneficiary or cooperating organization.



# COOPERATING ORGANIZATIONS



1. Reputable **non-Rotary organizations** or academic institutions that provide expertise, infrastructure, advocacy, training, education, or other support for the grant.
2. Need to **comply with all reporting and auditing activities** required by The Rotary Foundation and provide receipts and proof of purchases as required.



# COOPERATING ORGANIZATIONS



3. All **funding** provided to cooperating organizations needs to be **used for specific project expenses**. The sponsoring club needs to maintain an itemized report of these expenses.
4. The sponsoring club needs to provide a **signed letter / MOU** from the cooperating organization that specifically includes:
  - an agreement from the cooperating organization to **participate in any financial review** of activities connected with the grant by Rotary District 5450 or the Rotary Foundation
  - the **cooperating organization's responsibilities** and how it will interact with Rotarians to implement the grant project.



# BENEFITING ENTITY

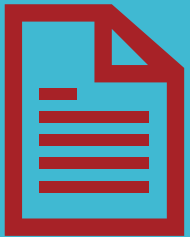


A benefiting entity (or beneficiary) is the **recipient of goods or services** and is not considered a cooperating organization.





# REPORTING REQUIREMENTS AND DOCUMENTATION



1. Reports that document the implementation of the grant project (including how grant funds were used) must be submitted to the District Grants Committee at a minimum within one year of the grant approval date. For incomplete projects, an interim report is strongly recommended within 6 months of project initiation.

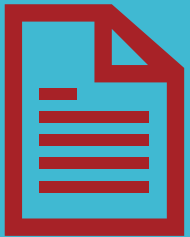
If the project is incomplete at the end of the grant approval year (June 30) and was approved before January 1st in the current grant year (i.e. the grant has been active for six or more months), submit an interim report.

Submit a final report for all completed projects within the grant approval year. For any project not completed within the grant approval year, a final report must be filed no later than June of following grant year.

2. Grant reports (progress or final) should be submitted to [grants5450@gmail.com](mailto:grants5450@gmail.com).
3. Grant sponsors need to keep copies of all **receipts and bank statements** related to grant-funded spending.



## REPORTING REQUIREMENTS AND DOCUMENTATION

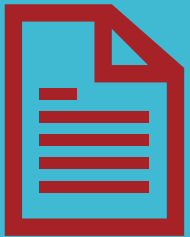


4. Progress reports must **include receipts** for expenses shown in the report. The final report **MUST** include any remaining receipts for expenses paid with Grant Funds and bank statements showing receipt and distribution of those funds

5. If any part of the grant funds was managed by any entity other than the District 5450 sponsor Club, the final report must include **bank statements showing all transactions** and a **letter from the organization** stating that all grant funds were spent on items listed in the grant. Receipts from the organization or a detailed summary of expenditures and dates are required.



## REPORTING REQUIREMENTS AND DOCUMENTATION



6. All grant projects and activities funded by district grants need to be **completed within 12 months** of the grant approval date.

7. If **\$500 or more of grant funds remain** after the projects are completed, the District Grants Committee needs to approve their use for additional project-related expenses or any other appropriate humanitarian project.

If the remaining funds are **less than \$500**, the Club may spend this fund on any humanitarian-related activities after notifying the Grants Committee.

8. A club will be ineligible to apply for a new grant if it has an **overdue or delinquent grant report**.



# IMPORTANT CHANGES FOR 2023-2024



Each year the District reviews the availability and allocations of DDF. Effective July 1, 2023, the **District** will implement changes based on demand and using DDF as efficiently as possible.

The **Rotary Foundation** makes similar analysis and has also adopted changes to maximize the effectiveness of available funds in the coming Rotary year. The **important changes effective on July 1, 2023**, are:

## District Grants:

- DDF allotment for District Grants of **\$110,000**.

## Global Grants

- DDF allotment for Global Grants of **\$110,000**
- First Come First Serve process for DDF allocation
- TRF provides 80% match to every dollar of DDF (.80 cents to \$1.00)
- D5450 will provide 1.25 to 1.00 dollar ratio (ENHANCED INCENTIVE) for every District Club sponsored global Grant.
- Grants originating outside of our district will still be at the 50% match.



# District 5450 District Designated Funds (DDF) for District and Global Grants 2023- 2024



## District Grants

DDF for District Grants is only available as a dollar for dollar match to a Club's cash contribution up to the limits below. District Grants do not receive additional matching funds from The Rotary Foundation (TRF.)

- The amount of DDF available for 2023-2024 for District Grants is **\$ 110,000**
- Awards based on a **First Come First Serve** basis until the DDF pool is exhausted. The District may prorate awards in the month in which the DDF runs out.
- **Club Limits:** **The maximum DDF that a Club may request as a match in the Rotary year is not limited based on local or international designation.**
- **Grant Limit:** The maximum DDF that may be requested for each District Grant is determined by the number of Clubs contributing to the Grant:
  - \$3,000 if there is only one Club
  - \$4,000 if there are two Clubs
  - \$5,000 if there are three Clubs
  - \$6,000 if there are four or more Clubs

Cash will only be matched if it originates from a Club in District 5450. Contributions by one club to another club for the primary purpose of increasing DDF matching funds is prohibited





# District 5450 District Designated Funds (DDF) for District and Global Grants 2023- 2024



## Global Grants

DDF for Global Grants is only available as a match to a Club's cash contribution up to the limits below. TRF also provides a match on DDF for Global Grants.

- The amount of DDF available for 2023-2024 for Global Grants is **\$110,000**.
- Global Grant DDF will be awarded on a **First Come First Serve** basis until the DDF pool is exhausted. Details of that process can be found in the District 5450 Terms and Conditions document for Global Grants.
- **Club Limits:** The maximum DDF that a Club may request as a match in the Rotary year is \$15,000 for one or more Global Grants.
- **Grant Limit:** The maximum DDF that may be requested for a Global Grant is determined by the number of Clubs contributing to the Grant:
  - \$10,000 if there is one Club
  - \$15,000 if there are two Clubs
  - \$20,000 if there are three Clubs
  - \$25,000 if there are four or more Clubs.

Cash will only be matched if it originates from a Club in District 5450. Contributions by one club to another club for the primary purpose of increasing DDF matching funds is prohibited.



# District 5450 Online Grant Application And Submission 2023- 2024



## District 5450 Grant Applications 2022-2023

This application form is for the Rotary Year July 1, 2022 through June 30, 2023.

For ease of submission, companion documents supporting this application will be requested. These are found at the District Grant website (along with the District 5450 Terms and Conditions):

- project budget
- table of cash and DDF contributions by club
- cash and DDF confirmation forms for each contributing club
- cooperating organization MOU template (when indicated)

<https://portal.clubrunner.ca/50085/SitePage/grants>

Download these tools, complete as indicated, save to your personal files, and then attach at the appropriate location as requested within this application.

[grants5450@gmail.com](mailto:grants5450@gmail.com) [Switch account](#)



The name and photo associated with your Google account will be recorded when you upload files and submit this form. Only the email you enter is part of your response.

\* Required

Email \*

Your email

District 5450

Rotary



CREATE HOPE  
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# District 5450 Online Grant Application And Submission 2023- 2024



## Steps

- Go to District Grant Site for link to applicationb  
<https://portal.clubrunner.ca/50085/SitePage/grants>
- Open support documents that will be attached later (budget, cash and DDF contributors, cash and DDF confirmation forms, MOUs for cooperating organization if needed)
- Begin to fill out form
- Attach support documents as indicated
- Determine status of application is “Draft, Final, Revised Final”
- Your current response is sent back and you can edit as needed until finalized



# District 5450 Online Grant Application And Submission 2023- 2024



1. Go to District Grant Site and find link to google form application in online section (left side column, lower section)
2. Open related **support documents** found that will be attached later on
  - Budget Table and Contributing Clubs Cash and DDF Table
  - Cooperating Organization MOU
  - Cash & DDF Contribution District
  - Cooperating Organization MOU form
3. Complete requested information. If unable to complete all questions, close out and return later to edit.
4. Attach secondary **attachments** in appropriate locations
5. Determine **status of application** when ready to exit:
  - ☐ Draft – still in process, not ready for committee review
  - ☐ Final – all aspects complete, ready for committee review
  - ☐ Revised Final – previously submitted, corrections made, and new final form resubmitted
6. Your current completed response, regardless of completion status, is sent back to your listed email. You can edit as needed until finalized.
7. Once your submission is finalized, the review process will begin
8. You will be notified regarding the review status per standard operation procedures.



# District 5450 Online Grant Application And Submission 2023- 2024



## Advantages of Online Form

- Efficient
- User friendly
- Additional decision support at your finger tips
- Continuous edit functionality
- Minimal “must complete” items
- Quicker review and processing for approval






# DISTRICT 5450 GRANT REVIEW TEAM



<u>Rotarian</u>	<u>Club</u>	<u>Email address</u>	<u>Title</u>	<u>Role</u>
Martin Waters	Denver Mile High	<a href="mailto:mtwaters00@msn.com">mtwaters00@msn.com</a>	Grants Sub-Committee Chair	Oversee District Grants and report to District leadership
Patricia Mourillon	eClub 5450	<a href="mailto:pat@psmconsultingservices.com">pat@psmconsultingservices.com</a>	Member	pat@psmconsultingser vices.com
John Wright	Castle Rock.	<a href="mailto:jwright310@comcast.net">jwright310@comcast.net</a>	Member	District Grant Reviewer
Ralph Ogden	Denver Tech Center	<a href="mailto:irishcorky@aol.com">irishcorky@aol.com</a>	Member	District Grant Reviewer
Karen Loeb	Denver South East	<a href="mailto:kcloeb@gmail.com">kcloeb@gmail.com</a>	Member	District Grant Reviewer
Dan Hall	Denver Mile High	<a href="mailto:djhall@ncsc.org">djhall@ncsc.org</a>	Member	District Grant Reviewer



# ROTARY DISTRICT 5450 DISTRICT GRANT TERMS AND CONDITIONS



**Rotary District 5450  
District Grant**

**ROTARY DISTRICT 5450  
DISTRICT GRANTS TERMS AND CONDITIONS**

This document governs all District 5450 "District" grants applications. Rotary District 5450 may modify these terms and conditions at any time to reflect policy changes and to add clarity. You can find the District Grants Application form at <https://www.rotary.org/district-grants-application-form>

### WHAT IS A DISTRICT GRANT?

District Grants are awarded to support humanitarian projects sponsored by Rotary Clubs in District 5450; these projects are short-term (one year) and may be either local or international. District Grants are normally intended for smaller projects that would be ineligible to be funded as a Global Grant due to their size or characteristics. District Designated Funds (DDF) for these projects come from The Rotary Foundation (TRF) based on contributions to TRF by District 5450 members three years earlier. The District is responsible for administering the grants, meeting TRF limitations, and setting additional District requirements as needed.

### ELIGIBILITY

- Any Club within District 5450 can apply provided the Club meets the qualification requirements outlined below:
  - Club President must have attended a PETS training or an approved alternative.
  - Club President or Representative must attend District 5450 grant training seminar for the grant year.
  - MOU signed by the president and president-elect for the grant year submitted to District.
  - Proof of current filed IRS Form 990 submitted to District.
  - All reporting on prior Rotary grants must be up to date.
- Satellite Groups are ineligible for District Grants as they and their membership are members of their sponsoring Rotary Club.
- Proposed grant activities must:
  - Meet a need identified by the beneficiary community
  - Include active participation of District 5450 Clubs and Rotarians. Such participation may include the following:
    - Assessment of community needs
    - Development of a Project plan
    - Project implementation
    - Financial stewardship of Grant funds
    - Promotion of the Project through Rotary signage and publicity
  - Comply with the laws of both the United States and the area where the grant will be carried out and cause no harm. If you sponsor projects in or plan travel to countries sanctioned by the U.S. Treasury Department's Office of Foreign Assets Control, you may need to supply more information.
  - Be reviewed and approved by the District Grants Committee before their implementation. Grants may not be used to reimburse clubs for activities and expenses already completed or in progress. Planning for grant activities prior to approval is encouraged, but expenses may not be incurred. After grant approval, any changes to the original project plan must be pre-approved by District.
  - Be completed within 12-months of approval, except in cases where a waiver has been granted by the District Grants Committee.

- Grant-related administrative expenses must not exceed 10 percent of the total budget.
- Each Rotary year, the District will advise Clubs about potential limits on DDF for the year. This information and any subsequent changes will be available on the grants page of the District Website.
- Grant Applications will be allocated DDF on a first-come/first-served basis until all DDF reserved for District Grants are exhausted.
- The District retains the right to prorate some awards if the pool is exhausted before the end of the Rotary year.
- Grant sponsors must fully account for the source and utilization of any funding required to accomplish the Grant Project. The proposed District Grant budget must also be sufficient to accomplish the stated objectives of the Grant.

### HOW TO APPLY

- Complete and submit a signed copy of the District Grants Application form to the District Grants Committee via email, [grants5450@gmail.com](mailto:grants5450@gmail.com)
- In addition to the application form, you must also submit the following items:
  - A signed Cash and DDF Confirmation form from all participating clubs, including the sponsoring Club
  - A signed letter/MOU from the cooperating organization, if applicable
  - A signed letter/MOU from the international partner (Rotary Club or non-Rotary organization), if applicable
- Submission of the grant application to the District Grants Subcommittee does not guarantee approval or availability of DDF funds.



# RESOURCES



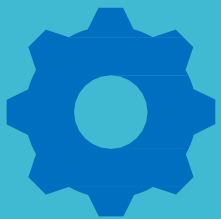
## Tools found at District 5450 Rotary Grants Overview

<https://portal.clubrunner.ca/50085/sitepage/grants>

- Club List
- Club Qualification Status
- Track District Grant Applications (list of submissions)
- Track DDF Awarded to Club including amount by club
- District Grants Process Club Qualification Requirements
- District Grant Application Form (online and paper versions), Report Form, and Cash & DDF Confirmation Form
- Club MOU
- OFAC Review list
- Cooperating Organization MOU sample and template



# RESOURCES: CLUB LIST



portal.clubrunner.ca/50085/ClubDirectory

**Rotary**  
District 5450

Training/Events ▾ News & PR ▾ Service ▾ Foundation ▾ Youth Services ▾ Contact Us ▾

## Club Directory & Contacts

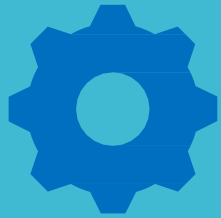
[View Map of All Clubs](#)

Display All records

Website	Club Name ^	Club Id	President	Location	Meeting Day & Time
	<a href="#">Arvada</a>	1089	<a href="#">April Fratzke</a>	Indian Tree Golf Course Restaurant	Wednesdays at 6:30 PM
	<a href="#">Arvada Sunrise</a>	27920	<a href="#">Ervin Zimmer</a>	Zoom Virtual Meetings	1st, 2nd, and 4th Tuesdays at 7:10am at Morning Story (3rd/5th Tuesdays at 5:30pm, location varies)
	<a href="#">Aurora</a>	1090	<a href="#">Regina Edmondson</a>	Virtually see the Zoom link below!	Wednesdays at 12:00 PM
	<a href="#">Aurora Fitzsimons</a>	64714	<a href="#">Barbara Curtin</a>	SpringHill Suites at Anschutz Medical Campus	Thursdays at 4:45 PM
	<a href="#">Aurora Gateway</a>	50290	<a href="#">Jerry Orlovsky</a>	Tin Cup at Meadow Hills Golf Club	Fridays at 7:20 AM
	<a href="#">Boulder</a>	1091	<a href="#">John Sullivan</a>	Boulder JCC	Fridays at 12:00 PM
	<a href="#">Boulder Flatirons</a>	50833	<a href="#">Jim Sible</a>	East Boulder Rec Center	Wednesdays at 7:15 AM
	<a href="#">Boulder Valley</a>	22628	<a href="#">Diana Fields</a>	Millennium Hotel	Tuesdays at Noon
	<a href="#">Breck Mountain Rotary</a>	78591	<a href="#">Curtis Slack</a>	Fatty's Pizzeria (Upstairs)	Tuesdays at 12:00 PM



# RESOURCES: CLUB QUALIFICATION



Club Qualification 2020-2021 ☆ Saved to Drive

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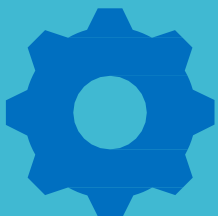
Working...

	A	B	C	D	E	F	G	H	I
1									
2									
3	Club Qualifications for District				For Rotary Year 2020-2021				
4	and Global Grants as of . . . 06/12/2020								
5	Club Name	Signed MOU for 7/1/19-6/30/20	Club 990 7/17 to 6/18	Club 990 7/18 to 6/19	District Training 2020-2021	District Training	Delinquent Global Grant Reports	Delinquent District Grant Reports	Date Qualified
6	Arvada		7/8/2019	3/16/2020	*	1/12/2019			
7	Arvada Sunrise	4/8/2020	1/29/2019	11/19/2019	*	05/06/2019			* 04/08/2020
8	Aurora			01/17/2020	*	1/12/2019			
9	Aurora Fitzsimons		9/20/2018	02/21/2020	1/11/2020	1/12/2019			
10	Aurora Gateway	11/21/2019	7/15/19	11/26/2019	1/11/2020	1/12/2019			12/03/2019
11	Boulder	07/02/2019	6/28/2019	03/16/2020	1/11/2020	1/12/2019			3/20/2020
12	Boulder Flatirons	10/21/2019	6/20/2019	10/29/2019	1/11/2020	1/12/2019			10/21/2019
13	Boulder Valley	05/24/2019	1/31/19	3/27/2020	1/11/2020	1/12/2019			05/24/2019
14	Breckenridge Mountain	07/05/2019		03/27/2020	*	08/15/2019			* 03/27/2020
15	Brighton	03/02/2020	12/19/2018	11/13/2019	01/11/2020				03/25/2020
16	Broomfield		07/22/2019	11/13/2019	01/11/2020				
17	Broomfield Crossing		11/7/2018	11/13/2019	*				
18	Brush		07/18/2018		1/11/2020	1/12/2019			
19	Carbon Valley	10/04/2019	9/17/2018	11/13/2019	*	1/12/2019			10/04/2019
20	Castle Pines	06/24/2019	6/24/2019	11/1/2019	*	1/12/2019			06/24/2019
21	Castle Rock	04/05/2020	7/18/2019	ex 04/04/2020	*	1/12/2019			* 04/05/2020
22	Castle Rock High Noon	07/25/2019	1/25/2019	11/13/2019	1/11/2020	1/12/2019			07/25/2019
23	Centennial	7/5/2019	7/18/2019	3/30/2020	*	1/12/2019			7/18/2019
24	Clear Creek 2000	07/05/2019		7/29/2019	*	1/12/2019			07/29/2019
25	Commerce City	06/28/2019	7/11/2019	1/23/2020	1/11/2020	1/12/2019			07/11/2019
26	Conifer	03/31/2020	8/24/2019	03/31/2020	01/11/2020				03/31/2020
27	Denver	08/12/2019	5/24/19	ex 4/1/2020	*	1/12/2019			* 04/01/2020
28	Denver Cherry Creek	07/16/2019	11/21/2018	11/19/2019	*	1/12/2019		DG 19-010	
29	Denver LoDo				*	1/12/2019			
30	Denver Mile High	12/19/2019	6/20/2019	12/20/2019	1/11/2020	1/12/2019			12/20/2019
31	Denver Southeast	09/27/2019	2/13/2019	3/27/2020	1/11/2020	1/12/2019			09/27/2019





# RESOURCES: TRACK DISTRICT GRANT APPLICATIONS



2019-2020 District-5450-Grant-Applications (Responses)										
File Edit View Insert Format Data Tools Form Add-ons Help Last edit was 7 days ago										
Grant Number (DG20-XXX)										
Grant Number (DG20-XXX)	Is the Club Qualified?	Project Name/Grant Project Description	Rotarian Participation	Cooperating Organization(s)	Project Country	Project State				
Approved	Reviewer Assigned	Club Name (Grant Sponsor)								
DG20-001	5/3/2019	09/29/2019	Tom Giordano	Mead	Yes	Enhancing Filipino Organ Help local farmers becom Rotarians involved in this Global Seed Savers Philippines Benguet Province				
DG20-002	5/3/2019	09/29/2019	Tom Giordano	Denver Southwest Rotary	No	Commission Water Project The project will be to bring The Denver Southwest Rotary Club's Global Project to the Community				
DG20-003	5/2/2019	07/02/2019	John Wright	Highlands Ranch	Yes	Seasonal Family Influenz Provide Influenza Vaccine Rotarians will help patient USA Colorado/Aurora				
DG20-004	5/13/2019	07/10/2019	Kevin Mizer	Castle Pines	Yes	Youth Education and Safe Provide Applied Suicide In Rotarians will help with se Douglas County Sheriff's USA Colorado/Highland				
DG20-005	6/4/2019	11/10/2019	Ralph Ogden	Summit County	Yes	ECO Stoves The project will build smo Rotarians will be involved Summit in Honduras Honduras El Cedral				
DG20-006	6/20/2019	07/16/2019	Buchi Anikpezie	Commerce City	Yes	Mental Health Initiative The project will increase I Rotarians will recruit participants and assist with the USA Colorado/Commerce City				
DG20-007	6/26/2019	09/29/2019	Tom Giordano	Boulder	Yes	E-Waste Recycling in the This project will set up a r The Green Land Society Palestine West Bank				
DG20-008	7/12/2019	07/26/2019	Buchi Anikpezie	Denver Cherry Creek	Yes	Dental Mission to the Jun A dental team will set up i Adelante Honduras LaCaiba				
DG20-009	7/15/2019	08/20/2019	Tom Giordano	Centennial	Yes	Rotary Playground at Dar This project will build a pl Rotarians will recruit volun Kids Around the World Lebanon MANSOURIEH, E				
DG20-010	7/21/2019	12/10/2019	Tom Giordano	Boulder Flatirons	No	Water for Life This project will provide water filters a villages in Peru and educate the resider Peru Amazon region				
DG20-011	8/29/2019	10/14/2019 (revised 12/10/2019)	John Wright	Commerce City	Yes	Mongolia Support The project will provide ex Commerce City Rotarians will obtain, pack and ship Mongolia Ulaanbaatar				
DG20-012	8/29/2019	09/29/2019	Kevin Mizer	Parker	Yes	Community Breakfast with The project will provide h Rotarians from the Parker Club conceptualized the United States Parker, CO				
DG20-013	9/4/2019	10/13/2019	Tom Giordano	Westminster 7-10	Yes	Los Gomez Water Supply The project will provide di Rotarians will be involved Mines without Borders, El Nicaragua Los Gomez				
DG20-014	9/5/2019	11/20/2019 (revised 01/10/2020)	Buchi Anikpezie	Littleton	Yes	Helping Mothers Survive This project will deploy a Rotarians from the Littleton Centura Global Health Ini Peru Iquitos, Loreto				
DG20-015	9/5/2019	11/20/2019	Buchi Anikpezie	Littleton	No	Mending Faces This project will provide h Rotarians from the Littleton Centura Global Health Ini Philippines Manila				
DG20-016	10/2/2019	11/18/2019	Buchi Anikpezie	Erie	No	Dictionaries for 3rd Grade Project will provide diction Rotarians from Erie facilitate the project from conce United States Erie, Colorado				
DG20-017	10/4/2019	10/14/2019	Buchi Anikpezie	Carbon Valley	Yes	Dictionaries for 3rd Grade This project will provide d Rotarians from the Club are involved in identifying b United States Frederick/Firestone				
DG20-018	10/25/2019	11/24/2019	Buchi Anikpezie	Granby	Yes	Bridging Gaps This project addresses th The Rotary club of Granby NA United States Grand County, CO				
DG20-019	11/6/2019	12/12/2019 (revised 3/2/2020)	Kevin Mizer	Boulder Valley	Yes	Juvenile Justice Volunteer This project will provide s Rotarians will be involved Voices for Children United States Boulder, CO				
DG20-020	11/19/2019	01/05/2020	John Wright	Wheat Ridge	No	Coats for Cold Kids Provide new coats to low- Rotarians were involved in the conceptualization of United States Wheat Ridge, CO				
DG20-021	11/20/2019	12/11/2019	Ralph Ogden	Centennial-Satellite	Yes	Rotary Books with Jacket The project will provide te Members of the sponsoring Rotary Club will be invo United States Colorado				
DG20-022	11/22/2019	01/08/2020	Kevin Mizer	Aurora Gateway	No	Little Free Food Pantry The Club is expanding its Members of the Club will purchase the food items at United States Aurora, Co				
DG20-023	12/12/2019	01/08/2020	Buchi Anikpezie	Denver Mile High	Yes	Hydrogeological survey This grant will cover the c communities in Zimbabwe Highlands Rotarians will r Highlands Club in Zimbat Zimbabwe Mabvuko Zimbabwe				
DG20-024	12/17/2019	01/08/2020	Buchi Anikpezie	Summit County	Yes	Mending Faces This project will facilitate c Summit County Rotary wi Broomfield Rotary's fund Kalibo Rotary Club in the Philippines Kalibo				
DG20-025	1/9/2020	01/27/2020	Kevin Mizer	Longmont Rotary	Yes	Micah Home Project would support the Rotary Club volunteers w InnBetween USA Longmont, CO				



# RESOURCES: TRACK DDF AWARDED TO CLUB



2019-2020\_District-Grant\_Approved-DDF\_by\_Club (Responses) ☆ 📄 🌐

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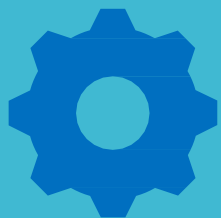
	A	B	C	D	E	F	G	H	I	J	K	L
1		Club	DDF Approved	Grant-Number	Grant-Title	Grant-Sponsor	Grant-Location/Country	Grant-Type		DDF Balance	\$479,683.00	
2	7/5/2019 14:57:12	Highlands Ranch	\$3,000.00	DG20-003	Seasonal Family Influenza Vaccine	Highlands Ranch	Aurora, Colorado	Local (US-Based)		DDF (District Grants)	\$89,861.00	
3	7/12/2019 11:35:14	Castle Pines	\$2,775.00	DG20-004	Youth Education and Safety in Schools	Castle Pines	Highlands Ranch, Colorado	Local (US-Based)		DDF (COVID-19 Grants)	\$40,050.00	
4	7/18/2019 3:32:57	Commerce City	\$2,500.00	DG20-006	Mental Health Initiative	Commerce City	Commerce City, Colorado	Local (US-Based)				
5	7/29/2019 17:16:14	Denver Cherry Creek	\$3,000.00	DG20-008	Dental Mission to the Jungle Honduras	Denver Cherry Creek	LaCeiba/Honduras	International (Non US-Based)				
6	7/29/2019 17:18:00	Breckenridge Mountain	\$1,000.00	DG20-008	Dental Mission to the Jungle Honduras	Denver Cherry Creek	LaCeiba/Honduras	International (Non US-Based)				
7	7/29/2019 17:19:39	Denver Mile High	\$500.00	DG20-008	Dental Mission to the Jungle Honduras	Denver Cherry Creek	LaCeiba/Honduras	International (Non US-Based)				
8	7/29/2019 17:20:36	Denver Southeast Rotary	\$500.00	DG20-008	Dental Mission to the Jungle Honduras	Denver Cherry Creek	LaCeiba/Honduras	International (Non US-Based)				
9	8/23/2019 1:38:51	Centennial	\$3,000.00	DG20-009	Rotary Playground at Dar El Awlad	Centennial	Lebanon	International (Non US-Based)				
10	9/30/2019 0:30:22	Parker	\$350.00	DG20-012	Community Breakfast with Santa	Parker	Parker, Colorado	Local (US-Based)				
11	9/30/2019 0:33:37	Boulder	\$3,000.00	DG20-007	E-Waste Recycling in the West Bank	Boulder	West Bank, Palestine	International (Non US-Based)				
12	9/30/2019 0:53:07	Mead	\$2,000.00	DG20-001	Enhancing Filipino Organic Farmers Se	Mead	Benguet Province, Philippine	International (Non US-Based)				
13	9/30/2019 0:54:01	Platteville	\$500.00	DG20-001	Enhancing Filipino Organic Farmers Se	Mead	Benguet Province, Philippine	International (Non US-Based)				
14	9/30/2019 0:54:38	Longmont Twin Peaks	\$500.00	DG20-001	Enhancing Filipino Organic Farmers Se	Mead	Benguet Province, Philippine	International (Non US-Based)				
15	10/13/2019 17:58:14	Westminster 7:10	\$3,000.00	DG20-013	Los Gomez Water Supply	Westminster 7:10	Nicaragua	International (Non US-Based)				
16	10/13/2019 18:00:29	Evergreen Rotary	\$1,000.00	DG20-013	Los Gomez Water Supply	Westminster 7:10	Nicaragua	International (Non US-Based)				
17	10/15/2019 0:19:40	Carbon Valley	\$864.00	DG20-017	Dictionaries for 3rd Graders	Carbon Valley	Frederick, Firestone, Dacon	Local (US-Based)				
18	10/15/2019 1:12:13	Commerce City	\$3,000.00	DG20-011	Mongolia Support	Commerce City	Ulaanbaatar/Mongolia	International (Non US-Based)				
19	11/20/2019 12:00:17	Littleton	\$2,000.00	DG20-014	Helping Mothers Survive	Littleton	Iquitos, Peru	International (Non US-Based)				
20	11/20/2019 12:03:19	Golden	\$1,500.00	DG20-014	Helping Mothers Survive	Littleton	Iquitos, Peru	International (Non US-Based)				
21	11/20/2019 12:04:35	Evergreen Rotary	\$1,000.00	DG20-014	Helping Mothers Survive	Littleton	Iquitos, Peru	International (Non US-Based)				
22	11/20/2019 12:12:28	Erie	\$2,612.00	DG20-016	Dictionaries for 3rd Graders in Participa	Erie	Erie, CO	Local (US-Based)				
23	11/26/2019 0:45:38	Granby	\$3,000.00	DG20-018	Bridging Gaps	Granby	Grand County, CO	Local (US-Based)				
24	12/11/2019 12:06:59	Boulder Flatirons	\$2,250.00	DG20-010	Water for life	Boulder Flatirons	Peru	International (Non US-Based)				
25	12/11/2019 13:55:12	Centennial-Satellite	\$3,000.00	DG20-021	Rotary Books with Jacket	Centennial-Satellite	Colorado	Local (US-Based)				
26	12/12/2019 7:37:06	Summit County	\$1,000.00	DG20-005	ECO Stoves	Summit County	Honduras	International (Non US-Based)				
27	12/12/2019 8:13:33	Boulder Valley	\$3,000.00	DG20-019	Juvenile Justice Volunteer Support	Boulder Valley	Boulder, CO	Local (US-Based)				
28	1/6/2020 7:46:02	Wheat Ridge	\$1,000.00	DG20-020	Coats for Cold Kids	Wheat Ridge	Wheat Ridge, Colorado	Local (US-Based)				
29	1/10/2020 20:21:35	Summit County	\$1,000.00	DG20-024	Mending Faces	Summit County	Philippines	International (Non US-Based)				
30	1/10/2020 20:22:23	Broomfield	\$3,000.00	DG20-024	Mending Faces	Summit County	Philippines	International (Non US-Based)				
31	1/10/2020 20:32:41	Denver Mile High	\$1,500.00	DG20-023	Hydrogeological survey	Denver Mile High	Zimbabwe	International (Non US-Based)				
32	1/10/2020 20:37:51	Aurora Gateway	\$1,500.00	DG20-022	Little Free Food Pantry	Aurora Gateway	Aurora, Colorado	Local (US-Based)				
33	2/5/2020 11:27:18	Aurora Gateway	\$1,000.00	DG20-014	Helping Mothers Survive	Littleton	Iquitos, Peru	International (Non US-Based)				

Form Responses 1 Approved-DDF-by-Club





# RESOURCES: GRANT OVERVIEW



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## Grants Overview

### Grants

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[District Grants](#)

[Global Grants](#)

[Sue Fox Memorial Grant](#)

[District Grants 2017-2018  
Applications D1 2018](#)

[District Grants Awarded 2016-  
17](#)

[2015-16 District Grants Matrix](#)

[District 5450 Grants since 2009](#)

### Links

[2020-21 DDF Announcement](#)

[2020-21 DDF Maximums](#)

### District 5450 Rotary Grants Overview

[Click Here to View the 2020-2021 Grants Club Qualification Report](#)

[Click Here to View Approved 2019-2020 District Grant Applications](#) *(link available soon)*

#### Club Qualification for Sponsoring Rotary Grants

A District 5450 Club that sponsors a Global Grant or District Grant must be "qualified" before the grant application can be approved. Club qualification is renewed annually and requires that:

1. The Club President must have attended a PETS training or an approved alternative.
2. The Club President or Representative must attend District 5450 grant training seminar for the grant year.
3. An MOU signed by the president and president-elect for the grant year be submitted to District.
4. Proof of current filed IRS Form 990 be submitted to District.
5. All reporting on prior Rotary grants is up to date.

Go to the Club Qualification page for more information and instructions.

#### District Designated Funds

50% of the contributions to the Rotary International Annual Fund are returned 3 years later to the District as DDF (District Designated Funds). DDF is divided into two separate pools:

- District Grant DDF which is returned to the District and used as the match for District Grant awards, which are administered by the District.
- Global Grant DDF, which is held by The Rotary Foundation (TRF), and is used as a match for Global Grants, which are reviewed and approved by TRF.

#### District Grants


**Complete Guidance for District Grants effective July 1, 2020 can be found in the District 5450 District Grants Terms and Conditions, which can be found using the link on the left side of this page**

District Grants are humanitarian projects, either local or international, that meet TRF and District guidelines. A



# RESOURCES: APPLICATION FORM



**Rotary**  
District 5450

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District Grants

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[Club Qualification](#)

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[District Grants Application Form 2020-2021](#)

[District Grant Report Form 2020-2021](#)

[2020-21 District 5450 District Grants Terms & Conditions](#)

[District Grant Report Form 2019-2020](#)

[Cash & DDF Contribution District](#)

### District Grants Process 2020-2021

District grants are intended to support club-sponsored humanitarian projects that align with The Rotary Foundation and District 5450 missions. These grants are hands-on Rotarian projects that address immediate needs in the benefiting communities, both local and international.

**Complete Guidance for District Grants effective July 1, 2020 can be found in the District 5450 District Grants Terms and Conditions, which can be found using the link on the left side of this page**

District Grants are humanitarian projects, either local or international, that meet TRF and District guidelines. A District Grant:

- Meets a need identified by an underserved community.
- Is a Rotary project, with signage and publicity; not the project of another organization.
- Has all Grant funds under the control of Rotarians.
- **Does not incur expenses or begin until the Grant application has been approved.**
- Has hands-on involvement by the sponsoring Rotarians at the project site or, in the case of an international project, hands-on involvement by a partner Rotary Club in the project area.
- Is designed to be completed by the end of the Rotary year.
- Meets the additional requirements included in the District 5450 District Grant Terms and Conditions referenced above.

#### District Grant Funding

- Club funds will be matched \$1 to \$1 with DDF up to the limits below. District Grants do not receive additional matching funds from TRF.
- The DDF pool for District Grants is separate from that for Global Grants. The amount of DDF available for 2020-2021 for District Grants is \$145,000.
- Approved District Grant applications will be awarded DDF until the DDF pool is exhausted. The District may prorate awards in the month in which the DDF runs out.

3

20 Rotary Year

0, 2020. It may be submitted as early as  
ase submit this application to

Champion	
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ie Number	
End Dates*	

olved in identifying the need?

on in the project country that will work with you

plementation?

munity or other donors.

Include the publicity plan and the

signage that will be used to identify the project as funded by Rotary.

5. List at least two specific activities that your club's Rotarians will do to help implement this project, excluding fundraising. Direct hands-on involvement is required in every Project. What will partner Club Rotarians do?

6. If an organization other than the Club is involved in the project, what will that organization do?

7. Funds are provided to the sponsoring Rotary Club and should be under their control. All purchases should be made with the goal of getting the best value. How will that be done if

a. The Club makes the purchases (comparison shopping, competitive bidding, etc.)? If possible, the Club



# RESOURCES: REPORT FORM



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District Grant Application 2020-2021

**District Grant Report Form 2020-2021**

2020-21 D5450 District Grants Terms & Conditions

District Grant Report Form 2019-2020

Cash & DDF Contribution District

**District Grants Process 2020-2021**

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- Has all Grant funds under the control of Rotarians.
- Does not incur expenses or begin until the Grant application has been approved.**
- Has hands-on involvement by the sponsoring Rotarians at the project site or, in the case of an international project, hands-on involvement by a partner Rotary Club in the project area.
- Is designed to be completed by the end of the Rotary year.
- Meets the additional requirements included in the District 5450 District Grant Terms and Conditions referenced above.

**District Grant Funding**

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- Approved District Grant applications will be awarded DDF until the DDF pool is exhausted. The District may prorate awards in the month in which the DDF runs out.

Report 2020

the completion of the project.

be submitted by April 30, 2020, or 90 days after the completion of the project. Subsequent Progress Reports are due by April 30, 2021, or 90 days after the completion of the project, whichever is later. Due to covid-19 disruptions, the April 30, 2021 deadline is extended to June 30, 2021.

Project completion date:

Where will project activities take place? If this is a progress report, please provide a brief description of the project's progress to date.

What humanitarian need was met?

How was the project maintained?

How many local Rotarians, if any, for international projects, were involved in the project? Please provide the number of hours that they spent?

What social support was provided to the project?

Who were involved?

6. In what ways will this be seen as a Rotary project? Include the publicity plan and the signage that identifies this as a Rotary project. If possible, provide photo's in jpeg format showing signage, volunteer activities, items purchased, etc.

DISTRICT 5450 GRANTS TRAINING 2023-2024

CREATE HOPE  
in the WORLD

51



# RESOURCES: CLUB MOU



CLUB NAME \_\_\_\_\_

**CLUB QUALIFICATION MEMORANDUM OF UNDERSTANDING**  
THE ROTARY FOUNDATION

- Club Qualification
  - Club Officer Responsibilities
  - Financial Management Plan
  - Bank Account Requirements
  - Report on Use of Grant Funds
  - Document Retention
  - Reporting Means of Grant Funds

**1. Club Qualification:** To participate in Rotary Foundation global and project grant implementation, the club must accept the requirements in the (MOU) provided by The Rotary Foundation (TRF) and to agree to be subject to the grant management guidelines each year. The district may also require the club to be subject to the club qualification and/or require the club to be subject to the Rotary Foundation district grants. By accepting these requirements, the club is eligible to participate in the TRF grant program.

- The club must accept the requirements in the (MOU) provided by The Rotary Foundation (TRF) and to agree to be subject to the grant management guidelines each year.
- The club must accept the requirements in the (MOU) provided by The Rotary Foundation (TRF) and to agree to be subject to the grant management guidelines each year.
- The club must accept the requirements in the (MOU) provided by The Rotary Foundation (TRF) and to agree to be subject to the grant management guidelines each year.
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- The club must accept the requirements in the (MOU) provided by The Rotary Foundation (TRF) and to agree to be subject to the grant management guidelines each year.
- The club must accept the requirements in the (MOU) provided by The Rotary Foundation (TRF) and to agree to be subject to the grant management guidelines each year.

**2. Club Officer Responsibilities:**  
The club officers hold primary responsibility for club qualification and TRF grants.

Club officer responsibilities include:

- Appointing at least one club member to implement, monitor, and maintain the club qualification and TRF grants.
- Ensuring that all TRF grant activities are carried out in accordance with the club qualification and TRF grants.
- Ensuring that all individuals involved in a grant project have received the necessary training and resources.

CLUB NAME \_\_\_\_\_

**A. Financial Management Plan**  
The club must have a written financial management plan to provide consistent administration of grant funds.

- The financial management plan must include procedures for:
  - Identifying a cluster of all of accounts, which includes a complete record of all receipts and disbursements of grant funds.
  - Identifying grant funds, as appropriate.
  - Identifying expenditures of funds for funding funds.
  - Establishing a system for recording and reporting grant funds and income.
  - Ensuring that the club's financial records are maintained in accordance with the club's financial management plan.
- Bank Account Requirements: In order to receive grant funds, the club must have a dedicated bank account that is used solely for receiving and disbursing TRF grant funds.

- The club must have a bank account.
- The club must have a bank account that is used solely for receiving and disbursing TRF grant funds.
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- The club must have a bank account that is used solely for receiving and disbursing TRF grant funds.

**B. Report on Use of Grant Funds:** The club must submit to all TRF a copy of the grant management and monitoring report on the use of grant funds.

**C. Document Retention:** The club must maintain a complete and accurate record of all grant management and monitoring documents, including:

- Financial management plan.
- Financial management plan.
- Financial management plan.
- Financial management plan.
- Financial management plan.
- Financial management plan.

**D. Club Qualification:** The club must maintain a complete and accurate record of all club qualification and TRF grant activities, including:

- Financial management plan.
- Financial management plan.
- Financial management plan.
- Financial management plan.
- Financial management plan.
- Financial management plan.

**E. Club Qualification:** The club must maintain a complete and accurate record of all club qualification and TRF grant activities, including:

- Financial management plan.
- Financial management plan.
- Financial management plan.
- Financial management plan.
- Financial management plan.
- Financial management plan.

CLUB NAME \_\_\_\_\_

**7. Reporting Means of Grant Funds**  
The club must report any activities and results of the management of grant funds to the district. The reporting means of grant funds include:

**Club Qualification and Agreement**  
The club must accept the requirements in the (MOU) provided by The Rotary Foundation (TRF) and to agree to be subject to the grant management guidelines each year.

The club must accept the requirements in the (MOU) provided by The Rotary Foundation (TRF) and to agree to be subject to the grant management guidelines each year.

The club must accept the requirements in the (MOU) provided by The Rotary Foundation (TRF) and to agree to be subject to the grant management guidelines each year.

Club Qualification		Club Qualification	
Name		Name	
Signature		Signature	
Date		Date	

Note: The club must be approved by the club president and the club secretary for the year that the club is reporting on the club's activities.



# RESOURCES: OFAC REVIEW LIST



Imported

An official website of the United States Government

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U.S. DEPARTMENT OF THE TREASURY

ABOUT TREASURY SECRETARY MNUCHIN POLICY ISSUES DATA SERVICES NEWS

SEARCH

For small businesses seeking direct relief from COVID-19, [CLICK HERE](#) to learn more about Paycheck Protection Loans.

Consumer Policy

Economic Policy

Financial Markets, Financial Institutions, and Fiscal Service

Financial Sanctions

Specially Designated Nationals List (SDN List)

Consolidated Sanctions List

Search OFAC's Sanctions Lists

Additional Sanctions Lists

OFAC Recent Actions

Complete List of Sanctions Programs and Country Information

Frequently Asked Questions

OFAC Civil Penalties and Enforcement

Contact OFAC

International

Small Business Programs

Tax Policy

Terrorism and Illicit Finance

**Resource Center**

Home » Resource Center » Financial Sanctions » Programs

**Sanctions Programs and Country Information**

OFAC administers a number of different sanctions programs. The sanctions can be either comprehensive or selective, using the blocking of assets and trade restrictions to accomplish foreign policy and national security goals.

Where is OFAC's country list?

Active Sanctions Programs:	Program Last Updated:
Balkans-Related Sanctions	02/03/2017
Belarus Sanctions	10/22/2019
Blocking Property of Certain Persons Associated with the International Criminal Court Sanctions	06/11/2020
Burundi Sanctions	06/02/2016
Countering America's Adversaries Through Sanctions Act of 2017 (CAATSA)	05/20/2020
Central African Republic Sanctions	12/13/2017
Counter Narcotics Trafficking Sanctions	04/22/2020
Counter Terrorism Sanctions	06/17/2020
Cuba Sanctions	04/20/2020



# QUESTIONS



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in the **WORLD**



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in the **WORLD**

# David L. Willman

## Club Qualification Requirements



# Qualification Requirements

- Club President Elects attended PETS (Winter/Spring 2023)
- Grant management seminar (June 15, 2023)
- Club memorandum of understanding
- All Current and Former Grant Reporting Current
- Club in Good Standing with the IRS.



## Club in Good Standing with IRS

- Confirmation of Club's Form 990 Filing
- Annual requirement
- Submit to Bev Mendel, D5450 Operations Manager,  
[office@rotary5450.org](mailto:office@rotary5450.org)





# Club Qualification Status

Club Qualifications for District									
					For Rotary Year 2022-2023				
and Global Grants as of . . .	5/22/2023								
Club Name	Signed MOU for 7/1/22-6/30/23	Club 990 7/20 to 6/21	Club 990 7/21 to 6/22	District Training 2022-2023	Attended PETS Training	Delinquent Global Grant Reports	Delinquent District Grant Reports	Delinquent District Covid Grant Reports	Date Qualified
Arvada		08/25/2021	11/14/2022						
Arvada Sunrise	09/21/2022	01/06/2022	11/16/2022	06/23/2022	2022				9/21/2022
Aurora	10/05/2022	04/20/2022	03/10/2023		2022				03/10/2023
Aurora Fitzsimons	08/22/2022	12/10/2021	11/11/2022	6/23/2022	2022				8/22/2022
Aurora Gateway	09/21/2022	11/02/2021	11/14/2022		2022				
Boulder	08/22/2022	02/03/2022		06/23/2022	2022		DG21-031		
Boulder Flatirons	07/19/2022	10/14/2021	01/04/2023	06/23/2022	2022				2/7/2023
Boulder Valley	10/05/2022	09/28/2022	Ext 1/3/2023	06/23/2022	2022				10/5/2022
Breckenridge Mountain	08/25/2022	12/08/2021	10/19/2022	06/23/2022	2022				8/25/2022
Brighton			02/06/2023	06/23/2022	2022				
Broomfield	03/16/2023	12/06/2021	12/30/2022	02/24/2023	2022				3/16/2023
Broomfield Crossing		10/06/2021	08/04/2022	06/23/2022	2022				
Brush					2022				
Carbon Valley	08/22/2022	01/19/2022	03/06/2023	06/23/2022	2022				8/22/2022
Castle Pines	07/19/2022	09/07/2021	12/28/2022	06/23/2022	2022				7/19/2022
Castle Rock		02/22/2022	Ext 4/24/2023	06/23/2022	2022				
Castle Rock High Noon	09/21/2022	08/04/2021	08/04/2022	06/23/2022	2022				9/21/2022
Centennial	09/21/2022	09/09/2022	12/30/2022	06/23/2022	2022				9/21/2022
Clear Creek 2000	08/22/2022	07/26/2021	07/12/2022	06/23/2022	2022				8/22/2022
Commerce City	02/27/2023	04/07/2022	02/16/2023	06/23/2022	2022				02/27/2023
Conifer		11/24/2021	10/07/2022	06/23/2022	2022				
Denver		01/09/2023	05/17/2023	06/23/2022	2022				
Denver Cherry Creek	08/22/2022	09/09/2021	09/23/2022	06/23/2022	2022				8/22/2022
Denver LoDo				11/16/2022	2022				
Denver Metro South	10/17/2022		09/27/2022	06/23/2022	2022				10/17/2022

[bit.ly/3CscLfv](https://bit.ly/3CscLfv)



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in the WORLD

## Terms of Qualification

- Valid for one year in current Rotary year.
- Club responsibility for grant funds
- Disclose conflicts of interest
- Cooperate with all audits
- Use grant funds properly
- Implement the club MOU



# Stewardship MOU

Stewardship is the responsible management and oversight of grant funds, including:

- Standard business practices
- Rotarian supervision
- Financial records and oversight
- Reporting of irregularities
- Timely submission of reports



# MOU Requirements

Club must appoint a member to implement, manage, and maintain club qualification:

- Ensure that all TRF grants adhere to proper stewardship and grant management practices
- Ensure that all individuals involved in a grant avoid any actual or perceived conflict of interest
- Submit signed MOU documentation via email to Bev Mendel, District 5450 Operations Manager at [office@rotary5450.org](mailto:office@rotary5450.org).





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**Bob Kemp**  
**District International Services Chair**



# Global Grants



- Partnership of 2 Clubs
- Host Club Responsibilities
  - Likely Manage funds
  - Oversee project
- International Club: funding
  - Updates and (often) reporting
- Both sponsor Clubs must be qualified



# Global Grant Impact



Global Grants create lasting change:

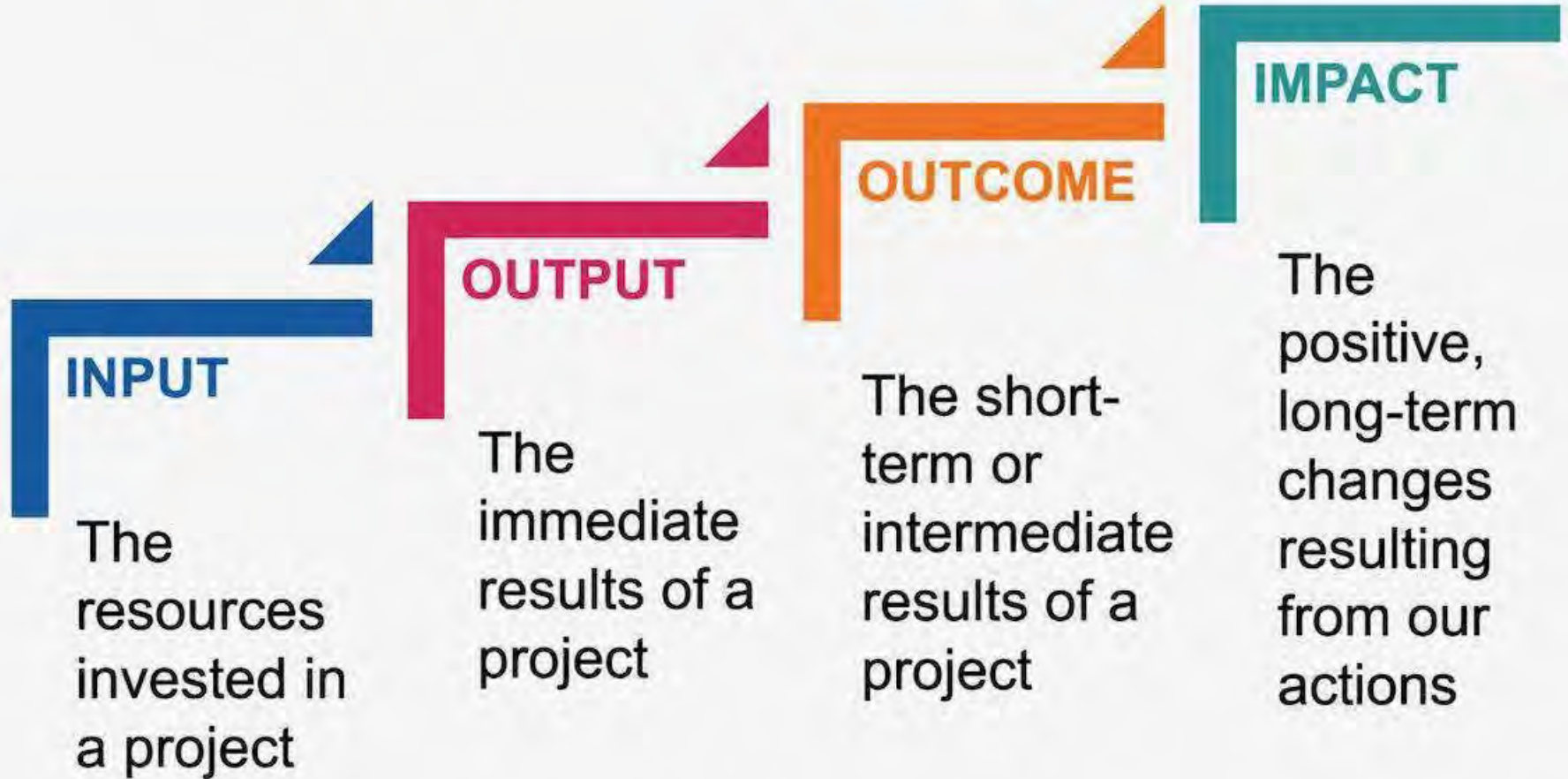
- Meet community needs
- Develop community ownership of the project
- Increase capacity in assets and knowledge
- Continue beyond Rotary funding



# Global Grant Impact

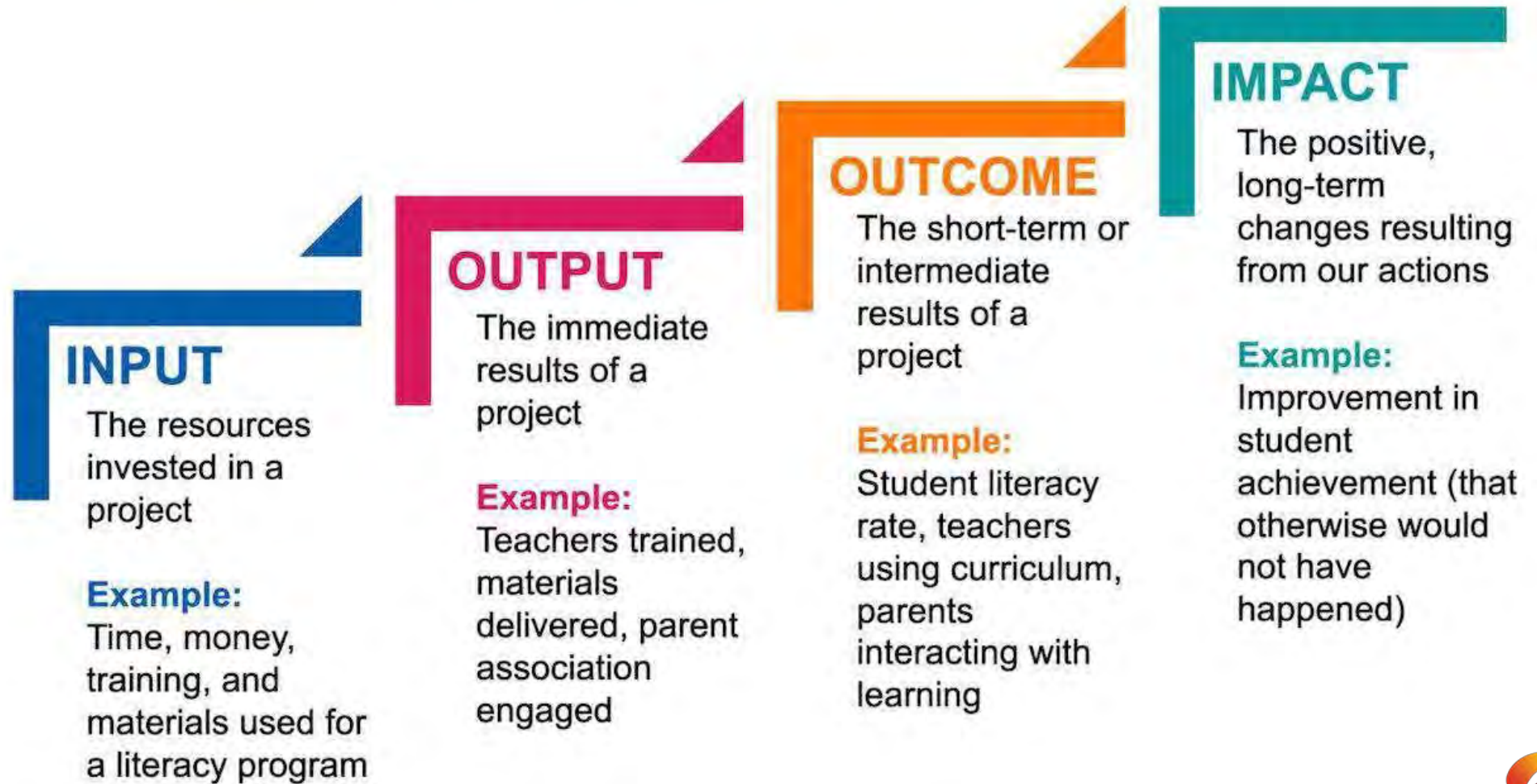


## "INCREASE OUR IMPACT"



# BUILDING BLOCKS TO IMPACT

## Global Grant Impact



# Important Resources



## Important Resources:

- A Guide to Global Grants: *overview of the entire process*
- Guidelines for Global Grant Funding: *detailed description of requirements*
- Areas of Focus Policy Statements: *description of eligible projects in each Area*
- *District Grant Advisor*
- *Cadre members in Area of Focus*
- *Regional RI Reviewer*
- *Rotary Action Groups*



# Community Needs Assessment



- Start with the community
  - What do they want?
  - Does it qualify for a Global Grant?
  - What will they support and maintain?
- Objective Community input
- Host Rotarians actively involved
- Local initiatives considered
- Include all stakeholders, including local government

# Areas of Focus



Peace and Conflict Prevention/Resolution



Disease Prevention and Treatment



Water and Sanitation



Maternal and Child Health



Basic Education and Literacy



Community Economic Development



Environment





# Funding for Global Grants



- Global Grants are funded through:
  - Cash from Rotary Clubs
  - Cash from other sources
  - District Designated Funds (DDF)
  - World Fund match from TRF: 80% for DDF only
- Minimum project size is \$30,000
- Start fundraising as soon as possible
- Consider using [Matchinggrants.org](https://www.matchinggrants.org)

# DDF for Global Grants



- \$15,000 maximum DDF for each Club per Rotary year.
- Maximum per project:
  - \$10,000 if one Club;
  - \$15,000 if two Clubs, and
  - \$20,000 if three Clubs, and
  - \$25,000 for four or more Clubs
- DDF match for grants:
  - \$1.25 per \$1.00 for D5450 grants
  - .50 per \$1.00 for non-D5450 originated grant
- Maximum DDF available for 2023-24: \$110,000



# DDF: First Come First Serve



- Sponsor submits DDF request with signed cash and DDF forms.
- District approves request, on condition that application is submitted to RI within 120 days
- Requests considered in order of receipt
- District approval of DDF from current year
- If application not submitted within 120 days, DDF request goes to the back of the queue

# Plan the Project



- Needs
- Funding
- Project Development
- Budget
- Implementation
- Outcomes
- Documentation

# Project Development



- Create a project plan that follows RI guidelines
- Local Rotarians should be actively involved; they
  - Know the culture and the language
  - Understand how the government works
  - They were part of the Community Needs Assessment
- Identify potential conflicts of interest

# Conflicts of Interest



- Exists when a Rotarian benefits financially or personally from a grant
- Benefit can be direct or indirect
- A conflict can be real or apparent
- A potential or perceived conflict must be disclosed



# Creating a Budget



- Host Rotary Club & community get bids
- Realistic
- Competitive bidding
- Balance cost and quality
- Will need Proformas for large expenditures

# Cooperating Organization



- Not a vendor
- Disclose any Conflicts of Interest
- Responsibilities
  - Necessary to implementation
  - Works side by side with Rotary sponsor
  - Understands “Rotary” Project
- The Host Rotary should be involved in the selection

# Global Grant Permissible Expenses



- 10% contingency
- 10% for project manager
- 10% for measurement/outcomes
- \$1,000 for project signage

# Setting Measurable Goals



- Make the measurement meaningful:
  - Outputs
  - Outcomes, if possible
- Sustainable
- Quantitative (numeric)
- Qualitative can be powerful: stories
- Identify baseline data source

# Financial Controls and Recordkeeping



- Separate Club Bank account for each grant
- Funds must be under Club control
- Formal payment process is followed
- Detailed ledger, receipts and bank statement
- Financial reviews by both Host and International Club
- 5-year documentation: accessible to Club members

# Applying for Global Grants



- RI application Online—start early
- RI assigns a grant number with little info
- Use Template to share with Committee
  - Then copy and paste online
- Generally, no specific deadline
  - Earlier in Rotary year is better to solicit funds from other Clubs
- RI Grant Advisor is invaluable



# Global Grant Application



- Include community identified needs
- Detailed plan and budget
- Describe activities and
- Outcome measurements
- Disclose how Rotarians will be involved
- Funding sources after Rotary grant ends

# Global Grant Submission



- Application is complete—ready to submit
- All funding committed and District has confirmed DDF
- Within 120 days of District DDF confirm
- Will need authorizations from each District
- Lock the grant; track approvals

# Global Grant RI Review



Once application is submitted:

- RI Regional Grant Advisor will communicate with sponsors on points of clarity or required changes
- Meeting Area of Focus and sustainability are key RI review items
- Determine how Clubs will send their cash commitments

# Global Grant RI Review



- Cash payments made to TRF:
  - 5% administrative charge
  - Donor will get Paul Harris credit
  - Consult Host Rotarian for preference/RI requirement
- Cash payments direct to Grant Account:
  - No administrative charge
  - No Paul Harris credit
  - Likely wire fees/ currency charges
- Discuss payment mode early with supporting Clubs

# Global Grant Reports Online



- Approval:
  - Notify all supporting Clubs
  - Track payments from other Clubs
  - Assist Host Club, if necessary
- DDF is automatically taken from the account of supporting Districts. No action is needed by sponsoring Clubs.
- Grant activity can begin before funds are received

# Global Grant Reports Online



- Progress reports
  - First due within 12 months of payment
  - Every 12 months until completed: *Prudent to accelerate first report*
- Detail activities, expenses, variances at report date
- Bank statements required with report
- Final report due 2 months after completion





# Global Grants Publicity



- Tell your story
  - Rotary Showcase
  - Local news, Club website
- Resources
  - Rotary5450.org under Grants
- Rotary website: [www.rotary.org](http://www.rotary.org)
  - In My Rotary
  - Under The Rotary Foundation, or
  - Learning and Reference



# Important Resources



To find Guidelines for each Area of Focus:

- Go to Rotary.org
- Log into “My Rotary”
- Move cursor to “Take Action”
- Scroll down to “Apply for Grants” and then over and up to “Global Grants”
- Click on “Global Grants”
- Scroll to very bottom of the screen to find the Guidelines for each Area of Focus



# QUESTIONS



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in the **WORLD**

Thank You



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in the WORLD**





**CREATE HOPE**  
**in the WORLD**

**David Willman**  
**Rotary District Foundation Chair**



# The Rotary Foundation



## THE ROTARY FOUNDATION – YOUR FOUNDATION

The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill, and peace by improving health, providing quality education, and alleviating poverty. More than 100 years ago, Rotarians took bold action to empower generations to come — they established The Rotary Foundation to secure a better future.

Today still, The Rotary Foundation transforms gifts into projects that change lives close to home and around the world. As the charitable arm of Rotary, the Foundation benefits from a global network of Rotarians who invest their time and expertise ensuring that projects are high-impact and sustainable and meet the most pressing needs of the communities they serve. Strong financial oversight, a stellar charity rating, and a unique funding model mean that Rotary makes the very most of your contributions.





# The Rotary Foundation



## Our Rotary Vision

Together, we see a world where people unite and take action to create lasting change — across the globe, in our communities, and in ourselves.

## Our Rotary Foundation Mission

The Rotary Foundation helps Rotarians to advance world understanding, goodwill, and peace by improving health, providing quality education, improving the environment, and alleviating poverty.

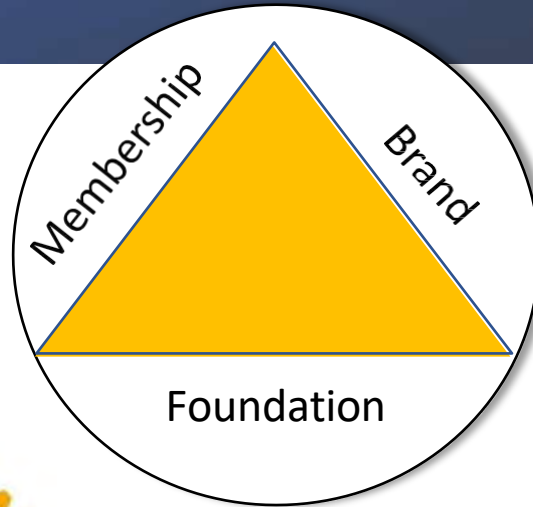


CREATE HOPE  
in the WORLD

The  
**Rotary**  
Foundation



**CREATE HOPE**  
in the **WORLD**



**CONNECTIONS**

**Rotary**  
District 5450



**Rotary**



Zones 26 & 27  
Big West

# The Rotary Foundation



- Primary funding source for Foundation grants and activities
- Supports local and international grants through the SHARE system
- Contributions are credited to the donor's club and applied to the club's Annual Fund goal
- Contributions are professionally invested.
- Only the earnings are spent.

# The Rotary Foundation



- All Rotary Grants (District Designated and Global) depend on Annual Fund contributions made to The Rotary Foundation. Contributions made 3 years ago provide the District Matching Funds for Rotary Grants (\$220K in 2020/2021). 33% of all Rotarians give to TRF. Without supporting The Rotary Foundation from our Rotarians – we would not be here today! It is the FOUNDATION of The Rotary Foundation!
- For the 14th consecutive year, The Rotary Foundation has received the highest rating — four stars — from Charity Navigator, an independent evaluator of charities in the U.S. 90% Program Awards 100% Rating

# Supporting The Rotary Foundation



## YOUR GIFT CAN PROVIDE CLEAN WATER


Clean water, sanitation, and hygiene education are basic necessities for a healthy environment and a productive life. Your donation to our Foundation's Annual Fund provides these essentials in communities close to home and around the world.

**GIVE TODAY:** [rotary.org/donate](https://rotary.org/donate)



# The Rotary Foundation



**TRIPLE YOUR IMPACT** 




For the next three years, the Gates Foundation will match every \$1 Rotary commits to polio eradication 2-to-1, up to \$50 million per year.

Your Donation	The Bill & Melinda Gates Foundation	Total Contribution to Fight Polio
<b>\$25</b>	<b>\$50</b>	<b>\$75</b>

which can purchase:

<b>150</b> vests for volunteers, to help health workers stand out in a crowd and safely administer vaccines	<b>75</b> vaccine carriers to keep the polio vaccine cool and effective	<b>600</b> purple finger markers to mark children's pinkies to show they've been immunized
--	--	---

HOW TO HELP

 **Learn.**     **Share.**     **Donate.**



**COUNTDOWN TO HISTORY** 



# District 5450 Grants



## District 5450 Grants

- **District Designated Fund Grants (DDF)**
  1. Local Humanitarian Projects (Service)
  2. International Humanitarian Projects
- **Global Grants (GG)**
  1. International Humanitarian Projects  
Seven Rotary Areas of Focus
  2. Vocational Training Teams
  3. Rotary Scholar Programs
    - a. Rotary Scholar (\$15,000)
    - b. Rotary Peace Scholar (variable)
    - c. Temple Buell Scholarship (\$30,000)

# DISTRICT QUALIFICATION



- Complete the qualification process online annually
- Agree to implement the memorandum of understanding (MOU)
- Conduct grant management seminars for clubs



# DISTRICT STEWARDSHIP



## *The* **ROTARY ACTION PLAN** STRATEGIC INITIATIVES

### INCREASE OUR **IMPACT**

Developing a consistent set of best practices for collecting and sharing Rotary's impact.

Rolling out Programs of Scale to provide us with a new framework for thinking about how we bring about change in the world.

Developing an evaluation framework that will help us make objective recommendations about what we should continue doing, start doing, or stop doing.

### ENHANCE **PARTICIPANT ENGAGEMENT**

Taking a participant-centered approach- making sure our members and other participants know we value what they bring to Rotary.

Looking at ways to measure member engagement and satisfaction so we can better understand what people are getting out of their Rotary experience.

### INCREASE OUR **ABILITY TO ADAPT**

Change management strategies are rolling out throughout Rotary—from the Secretariat to the club level as part of an effort to tackle operational issues to become more agile and responsive.

### EXPAND OUR **REACH**

Developing a comprehensive plan of action with achievable, measurable, and meaningful DEI outcomes for Rotary. Piloting and evaluating new products and alternative participant models so that people can join and take action with us, wherever they live.

Learn what your club can do at  
[rotary.org/actionplan](https://rotary.org/actionplan)





# BUILDING SUSTAINABLE PROJECTS



# TAKE ACTION



- Talk with your district Rotary Foundation committee chair or DISC about a future project.
- Read the [Guide to Global Grants](#)
- Review the [Community Assessment Tools](#)
- Work with your District International Service Committee, Technical Cadre or your district Rotary Foundation committee chair to improve the quality, impact, and sustainability of your global grant projects.
- Go to [Rotary Showcase](#) and Rotary magazine for project and partnership help.

# SUPPORTING THE ROTARY FOUNDATION



Rotary's tomorrow depends  
on what we do today.

– Arch C. Klumph

- Use a gift to honor or remember someone.
- Increase your impact with corporate matching.
- Start a fundraiser on Raise for Rotary.
- Leave a Legacy or Endowment Gift becoming a member of the Bequest Society.



**QUESTIONS**